Information Organization, Usability, Currency & Accessibility (IOUCA)
Meeting Minutes

Date: May 30, 2006
Time: 9:00 – 11:00 a.m.
Location: LC II, Room 340

Attendees:

☒ Linda Aguilar (DHS)	☐ Neal Albritton (DOR)	☒ Shayn Anderson (EDD)
☒ Steve Branson (DHS)	☒ Donna Freeman (FTB)	☐ Theresa Giles (DHS)
☒ Jennifer Harper (DHS)	☒ Jeff Hillard (CDFA)	☒ John Jewell (CSL)
☒ Patrick Johnson (DOR)	☐ Lee Macklin	☒ Anamarie Malone (DTS)
☐ Liz Mechem (Insurance)	☐ Claudina Nevis (SCIO)	☐ Sally Nietering (POST)
☐ Joni Ogata (DMHC)	☒ Kristine Ogilvie (CSL)	☒ Bill Passavant (DSS)
☐ Rob Quigley (SCIO)	☒ John Quijada (DMV)	☒ Deborah Schwartz (CRB)
☒ Brenda Washington (DHS)	☒ Morris Weisbart (CDFA)	

Accessibility Meeting with Adobe   Debbie Schwartz

State of California representatives met with Adobe representatives on May 25, 2006 to discuss accessibility issues associated with Adobe's PDF format. IOUCA members attending the meeting included Claudina Nevis, Neal Albritton, Steve Clemons, Lee Macklin, and Debbie Schwartz.

In the meeting, California emphasized the importance of accessibility for users with low vision; this can be a problem with PDFs.

Adobe reiterated the need for web developers to format PDFs correctly to ensure accessibility. This includes properly formatting Word documents before converting to PDF. Adobe provided more copies of their web accessibility training cd. It was agreed that training would need to be provided for content developers to ensure proper formatting. California will identify the training needs of content providers. IOUCA asked that this be added as an action item.

Neal is developing a detailed list of California's accessibility requirements for Adobe products. Adobe will review the list and schedule a follow-up discussion to address possible solutions.

Note: Legal documents are often required to be presented in PDF format when posted online.

Note: May also need to address how content may be developed in content management systems.

Status Updates – Recommendations to Review Board   Working Teams

General: The working group needs to determine how we will ensure consistency across working teams. The entire working group should review recommendations for consistency. Recommendations should provide direction, but may not need to include complete details. It is OK to note areas that will be developed further.

Next Tuesday is the last IOUCA meeting before the Review Board meeting.

Accessibility: The working team decided at their last meeting that it would be simpler for the formal recommendation to focus on adherence to Section 508 and W3C Priority Levels 1 and 2 as the standard then list the individual components as supplemental materials. This separates the standard (what) from the detailed support (how). It further lessens complexity by not adding another layer to what is already available through other sources. The working team modeled their approach on the State of Maine. The working group agreed with this direction.

Usability: The usability recommendation won't follow the model suggested by the accessibility working team because there is no usability equivalent to Section 508 and W3C. The working team will discuss their approach at today's meeting. They have identified those items in the Usability.gov guidelines that are measurable and can be set as standards.

Style Sheets: The working team followed a similar direction to the accessibility team, but the issues are a little broader. The focus will be on separating content from presentation. The team is trying to marry up the implementation of accessibility and usability with technology through Cascading Style Sheets.

Portal Redesign Project Update   Claudina Nevis
No update.

Action Items   Debbie Schwartz
ACTION: Draft usability standards, guidelines, and best practices.

> *Assigned To: Donna Freeman*
>
> *Due: May 30, 2006*
>
> *Update: Close – this is being addressed within a working team.*

ACTION: Develop a list of file types and versions that should be used for California web pages. The list should be prioritized by most desirable and focused on where we want to be in the future rather than where we are now.
> *Assigned To: Neal Albritton, Steve Branson, Steve Clemons*
>
> *Due: June 6, 2006 (Update)*
>
> *Update: A meeting was held with Adobe on May 25, 2006. Claudina, Neal, Steve Clemons and Debbie attended from IOUCA. Neal is developing a detailed list of California's accessibility requirements for Adobe products. Adobe will review the list and a follow up meeting will be scheduled to discuss solutions.*

ACTION: Provide a recommendation regarding IOUCA's use of the Webmaster's IT Forum and an FAQ posting on the State CIO's website (see Issue #5).
> *Assigned To: Steve Branson*
> *Due: May 30, 2006 (Update)*
>
> *Update: Closed; will address as part of the general communication action item.*

ACTION: Develop a beginner's version of the workbook.
> *Assigned To: Neal Albritton*
>
> *Due: June 13, 2006 (Update)*
>
> *Update: In progress*

ACTION: Discuss a process for disseminating information to content providers and webmasters quickly. Prepare a plan to establish ongoing communication with webmasters.
> *Assigned To: John Jewell*
>
> *Due: June 27, 2006 (Update)*
>
> *Update: In progress.*

ACTION: Follow up on the feasibility of using GTC, Executive Institute, and CIO Academy as vehicles for ongoing training.

> ***Assigned To***: *Claudina Nevis and Liz Mecham*
> ***Due***: *June 6, 2006 (Update)*
> ***Update***: *Claudina will meet with the executive officer of GTC later this week..*

Parking Lot

1. Frame the issue of application accessibility and usability.
   Assigned To: *Steve Clemons*
   Due: *June 27, 2006 (Update)*
   Update: *It was noted that many online applications are written by consultants; the state may not have the necessary skills to make changes. It was suggested that the two parking lot items be considered as Phase 2. IOUCA will need to work closely with CEAP on the two items.*

2. Conduct high level research and frame the issue of accessibility and usability in regards to online forms.
   Assigned To: *Steve Clemons*
   Due: *June 27, 2006 (Update)*
   Update: *See above.*

3. Content authors may benefit from training and instruction in writing for the web. There is a need for training for content developers. It may be beneficial if the IOUCA could identify these training needs. DHS offers web author training for readability, usability, and targeting information to the specific audience.

Next Steps   **Kris Ogilvie, Debbie Schwartz**
Next IOUCA Meeting: June 6, 2006
                                Library & Courts II, 900 N Street, Room 340
                                9:00 – 11:00 a.m.

Open Issues   **Debbie Schwartz**

1. How can the state design templates for current technology standards while accommodating departments with a wide range of expertise and software tools?
   The Review Board noted that some content management solutions can resolve this issue, but not all departments have strong content management systems in place. DTS is considering offering support. It was recommended at the IOUCA meeting on March 14th that we consider offering a resource gallery of images that can be used by any state department. It would be possible to offer a suite of templates using different color palettes that meet accessibility requirements. Before this can be decided, the issue of single look-and-feel for all California pages vs. multiple look-and-feel with common branding needs to be resolved at a higher policy level.

2. How can California enforce the standards after adoption? ***How will California ensure the application of standards across departments and over time (quality assurance)?[added 5/2]***
   California will likely approach adoption from an incentive perspective rather than an enforcement perspective. An exception is Section 508 compliance, which is mandated by state and federal law.

3. Should tools to implement standards (CSS, templates) be developed for current look and feel as well as new look and feels?

4. Guidelines are not always followed. Would it be better to develop standards only, but drive by level of compliance? For example,
   - Level 1 Standards: Minimal accessibility
   - Level 2 Standards: Moderate accessibility
   - Level 3 Standards: High accessibility

   Departments could be encouraged to work toward improving their websites by qualifying for higher levels. The state could provide "paths to accessibility" and could provide training for each level.

5. What skill sets will be needed to communicate, maintain, and implement the standards, guidelines, and tools the IOUCA is recommending?

6. How do we separate content from HTML (CSS only separates content from presentation)?
   This can be done through master templates in Dreamweaver, content management systems, or hard coding. The team needs to determine if this is part of our scope.